North Yorkshire Pension Fund

LGPC Bulletins Log

Bulletin Number	Action	Response
215 – Oct 2021	**Pensions Dashboards** Start preparing for dashboard on-boarding by considering whether we wish to use an ISP to connect to the dashboard ecosystem, cleansing our data and ensuring we have adequate resources to prepare for the dashboard connection.	In progress – ISP provider chosen, data cleansing commenced, monthly project meetings commenced, connection date set.
218 – Dec 2021	**Pensions dashboards – A to Z industry guide** Review the guide and start preparing for pensions dashboards. **Pensions dashboards – data matching guidance** Review the accuracy of the personal data values held for all active and deferred members	Completed – rolled into action above
231 – Nov 2022	**Pensions Dashboards Programme (PDP) publishes updated standards** Administering authorities should consider how they will comply with the standards. We recommend discussing the standards with their software provider or third party administrator, for those funds administered externally.	Completed – rolled into action above
243 – Oct 2023	**McCloud compensation cases** DLUHC would like to know if administering authorities receive any applications for McCloud compensation. Send depersonalised details of each case to lgpensions@levellingup.gov.uk. **Interfund transfers and the McCloud underpin** Apply the approach set out by DLUHC for interfund transfers.	Ongoing activity Ongoing activity
244 – Nov 2023	**McCloud technical guide for administrators** Use the McCloud technical guide to help you implement the McCloud remedy. **LGPS Pensions Dashboard connection guide** Review the LGPS Pensions Dashboards connection guide and start preparing to implement dashboards.	In progress Completed – rolled into dashboard action above
246 – Jan 2024	**New GAD guidance** Review the new guidance and amend your processes accordingly. Discuss the changes with your pensions administration software supplier.	Completed – processes amended
247 – Feb 2024	**2024/25 Pension scheme return** On 12 February 2024, HMRC published guidance for administrators preparing for the new 2024/25 pension scheme return. Review the guidance and complete the steps set out in it to prepare.	Completed – shared with relevant staff in Finance

249 – Mar 2024	**Annual Report Guidance 2024** Review the new guidance and implement the new requirements when producing and publishing your Fund's Annual Report.	Completed – 2024 annual report amended in line with the guidance
	Abolition of the LTA administrator guide On 22 March 2024, Jayne Wiberg emailed administering authorities about the release of an administrator guide on the 'Abolition of the LTA' and a draft 'Previous pension benefits declaration form'. Review the new guidance and amend your processes accordingly.	Completed
250 – Apr 2024	**LGA standard McCloud wording for 2024 annual benefit statements** Consider using the standard wording in the 2024 annual benefit statements	In progress – part of McCloud project
	Impact of the abolition of the lifetime allowance on the McCloud remedy Make further enquiries if you receive a transitional tax-free amount certificate application for a member who has previous benefits in a different public service pension scheme.	In progress – part of McCloud project
	Temporary unavailability of HMRC's remedy adjustment online service If you are aware of any members who need to calculate and report an annual allowance or lifetime allowance adjustment due to the McCloud remedy to HMRC, share this article with them.	No members affected yet
251 – May 24	**Pensions dashboards** On 30 April 2024, the Pensions Dashboards Programme published version 1.2 of the data standards. Discuss the data standards with your integrated service provider to ensure your administering authority is compliant. .	Completed – rolled into dashboard action above
253 – July 24	**GAD interest calculator for McCloud calculations** Use the calculators to work out interest due on retrospective McCloud calculations. Provide feedback on the calculators and user guide by contacting query.lgps@local.gov.uk.	In progress – part of McCloud project
	New version of annual benefit statement technical guide published Discuss the content of the guide with your software supplier in preparation for issuing annual benefit statements in 2025.	In progress
	McCloud - Annual benefit statements – reporting breaches If you do not include McCloud information in your 2023/24 annual benefit statements, prepare to report the breach to TPR if the regulations to exclude this information are not made by 31 August 2024.	Completed – regulations laid to exclude information from 2024 statements
	Fund annual reports for 2023/24 Please send final (or draft awaiting final audit report) 2023/34 annual reports to sabsecretariat@local.gov.uk when available.	Completed
	Your LGPS contacts – stay connected Review and update the information on 'Your LGPS contacts'.	Completed

	Training Share information about the employer role training with your Scheme employers. Discuss potential for commissioned training at Pension Officer Group meetings.	Completed
254 – Aug 24	**Updated flexible retirement guidance** Review the updated guidance and implement the changes to your calculations	Completed
	McCloud - Teachers with excess service Circulate the employer communication to affected employers in your Fund. Contact query.lgps@local.gov.uk if you did not receive the TPS communication or if you want to change the contact details used by TPS for this project.	Email sent 05/09/2024
	GAD Transaction data - underpin payments Ensure you are recording the extra payments for the underpin correctly	In progress – part of McCloud project
	Member websites - new lump sum tools Make members aware of the new and improved tools. Email query.lgps@local.gov.uk if you have any feedback about the tools.	Completed
	Dashboards connection guide Review the guides and create a project plan to implement dashboards.	Completed – rolled into dashboard action above
	Training Programme 2024 Share information about the employer role training with your Scheme employers. Discuss potential for commissioned training at Pension Officer Group meetings.	Completed - email sent 03/09/2024 Discussed at every NEPOF meeting
	Call for evidence: Institutional investment into affordable housing Respond to the survey by 13 September 2024.	Completed - passed to Finance team
	Pension committee chairs event Please share the details of this event with pension committee chairs. A formal invitation will be emailed separately.	Completed - sent to Steve Loach 30/08/2024
255 – Sept 24	**Paying death grants to genealogy companies** Review the legal advice and consider whether you need to make any changes to your death grant process.	Completed
	Errors in Teachers' Pension Scheme (TPS) Club transfer out quotations for members protected by the McCloud remedy Check any Club transfers quotations you have received from TPS carefully. Put the case on hold if the quotation includes errors. Email query@local.gov.uk with details if you identify any other issues to do with Club transfers for McCloud protected members.	In progress
	Training Share information about the employer role training with your Scheme employers. Discuss potential for commissioned training at Pension Officer Group meetings.	Completed - email sent 03/09/2024 Discussed at every NEPOF meeting
	October meeting of Pension Committee chairs Following the meeting held in June 2024 with pension committee chairs, the SAB Chair, Cllr Roger Phillips, will be holding another online meeting on 14 October 2024 at 6pm. Highlight the email about the October meeting with the Chair of your pension committee.	Completed - sent to Steve Loach 01/11/2024
256 – Oct 24	**McCloud administration guide – version 2** Review version 2 of the McCloud administration guide and implement appropriate changes to your calculations and processes.	In progress – part of McCloud project

	LGA Training Share information about the employer role training with your Scheme employers. Discuss potential for commissioned training at Pension Officer Group meetings.	Completed - email sent 03/09/2024 Discussed at every NEPOF meeting
	November meeting of pension committee chairs The meeting was originally scheduled for 14 October 2024 but has been pushed back until 5 November 2024 to accommodate the attendance of both Local Government Minister Jim McMahon and Pensions Minister Emma Reynolds. Highlight the 10 October 2024 email from Joanne Donnelly with your pension committee chair and ask them to respond to joanne.donnelly@local.gov.uk to be added to the meeting invitation.	Completed - sent to Steve Loach 01/11/2024
	Feedback on LGPS informer document Please send feedback on the document to sabsecretariat@local.gov.uk and ask your auditors and employers to do the same.	In progress
257 – Nov 24	**Extending inheritance tax to pension death benefits - consultation** Review the consultation document on extending inheritance tax to pension death benefits and consider responding.	Completed – we don't have time to respond to consultations
	QROPS (qualifying recognised overseas pension scheme): removal of an exclusion for overseas transfer charges Review the changes to the overseas transfer charge and amend your processes. Be careful with QROPS transfers paid after 5 April 2025 to schemes established in the EEA, as the scheme may no longer meet the conditions to be an OPS (overseas pension scheme) or ROPS (recognised overseas pension scheme).	In progress
	Application programming interface (API) for Heywood's customers (for Altair to talk to the NI Database) Review the API security addendum and update your processes accordingly. Sign the data sub-processor agreement issued by Heywood Pension Technologies.	Completed
	National Insurance Database (NIDB) privacy notices updated Review the updated notices and amend your local versions accordingly.	
	Prudential – submission of AVC payments and payroll files Inform your employers about the new payroll guide.	Completed – email sent 02/12/2024
	Reminder – submit your fund annual report for 2023/24 Please send completed 2023/24 annual reports to sabsecretariat@local.gov.uk as soon as possible	Completed – email sent 27/11/2024
	SAB website Review and update the information on 'Your LGPS contacts'	Completed